

MONTHLY ANALYSIS OF INDUSTRY EMPLOYMENT DATA
New Hampshire, June 2003
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NOTE: The Bureau of Labor Statistics (BLS) says, "For purposes of analysis, the BLS has further aggregated NAICS sectors into groupings called 'Supersectors'. The Current Employment Statistics (CES) program will publish data for these supersectors as well as sectors and detailed industries. Also, the aggregations to Goods-Producing and Service-Providing industries will be retained. The CES program will continue to classify all publicly owned establishments in government."

For more information on the CES conversion to NAICS, see our web site,
<http://www.nhes.state.nh.us/elmi/pdfzip/econanalys/articles/2002/NAICS.pdf>.

Seasonally Adjusted: New Hampshire total nonfarm employment grew by 1,200 jobs according to June's preliminary seasonally adjusted estimates. Government (supersector 90) supplied 2,200 of those jobs, while leisure and hospitality (supersector 70) made a 900-job contribution.

Manufacturing (supersector 30) employment remained at the level established in May.

The two remaining publishable supersectors showed a drop in their respective employment totals. Construction (supersector 20) reduced its ranks by 300 jobs, while trade, transportation, and utilities (supersector 40) trimmed its rolls by 400 jobs in June's seasonally adjusted estimates.

Unadjusted:

Vacation season had arrived in New Hampshire, attested to by the 8,600-job increase in the preliminary unadjusted estimates for June.

Leisure and hospitality (supersector 70) led the surge with a 6,300-job increase. The next largest contributor was trade, transportation, and utilities (supersector 40), which expanded its work force by 1,300 jobs. Other supersectors made smaller, but no less important, contributions to June's expansion. Other services (supersector 80) had a 500-job addition, while financial activities (supersector 55) and construction (supersector 20) each added 400 jobs to their respective personnel totals. Professional and business services (supersector 60) found it necessary to bring 300 more workers on board during June. Manufacturing (supersector 30) continued the upward movement of its employment trend line by adding 200 jobs, and natural resources and mining (supersector 10) completed the list of additions with a 100-job increase.

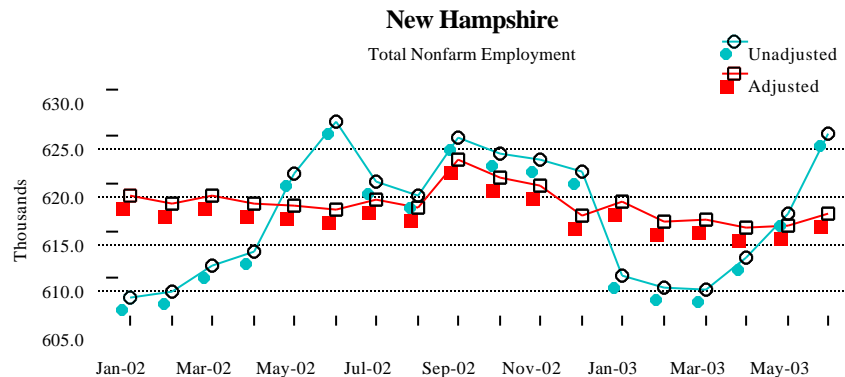
Three supersectors decreased employment levels in the June estimates. Government (supersector 90) and education and health services (supersector 65) each cut back by 400 jobs. Information (supersector 50) rounded the month's activities with a 100-job reduction.

NATURAL RESOURCES AND MINING

The 100-job increase in natural resources and mining (supersector 10) was distributed widely across the supersector.

CONSTRUCTION

Construction (supersector 20) employment grew by 400 jobs in June's preliminary unadjusted estimates. A review of the sample indicated the specialty trade contractors (subsector 238) were primarily responsible for the growth. The



sample further indicated that employment in the construction of buildings (subsector 236) and heavy and civil engineering construction (subsector 237) declined slightly.

Within specialty trade contractors (subsector 238), contractors doing work in the foundation, structure, and building exterior (industry group 2381) and other building equipment (industry group 2382) were the principal force behind June's employment increase.

MANUFACTURING

Manufacturing (supersector 30) added 200 jobs to its employment totals during the month of June. On the surface, durable goods manufacturing appeared to be responsible for manufacturing's increase. Durable goods manufacturing increased by 200 jobs, and nondurable goods manufacturing remained unchanged in over-the-month activity.

After three months of increases in employment levels, computer and electronic product manufacturing (subsector 334) dropped 100 jobs in May. Semiconductor and other electronic component manufacturing (industry group 3344) accounted for that job loss. Transportation equipment manufacturing (subsector 336) also reduced its roster by 100 jobs.

All other published industries in the durable goods manufacturing subsector sustained employment at the May level.

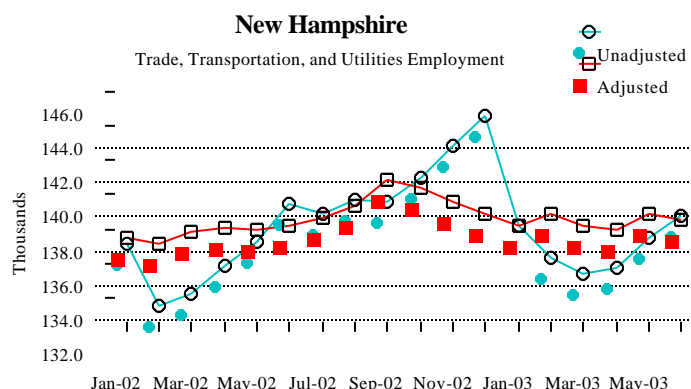
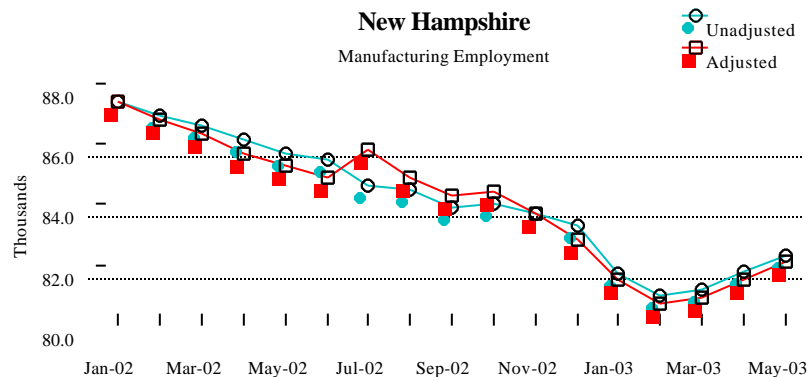
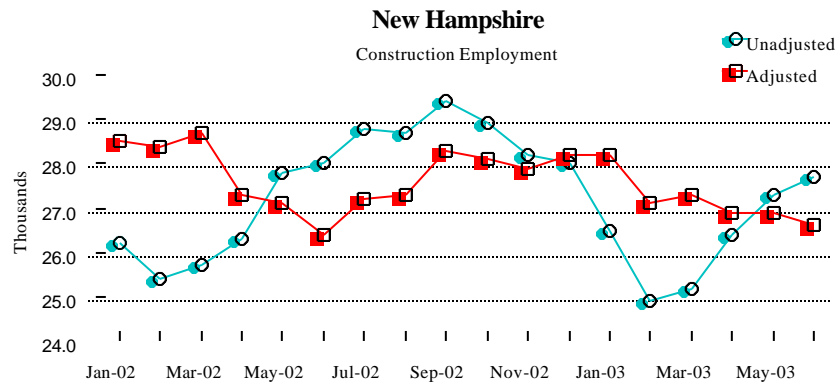
Although the non-durable goods manufacturing showed no change in over-the-month activity, food manufacturing, and beverage and tobacco product manufacturing (a combination of NAICS subsectors 311 and 312) and paper manufacturing (subsector 322), the only two published industries in this subdivision, each added 100 jobs to their respective rolls.

TRADE, TRANSPORTATION, AND UTILITIES

Seasonal trends during the month of June affect the trade, transportation, and utilities supersector employment levels, which is reflected in the 1,300-job increase. Specifically, retail trade has entered one of its peak season, and consequently, the employment levels grew by 1,100 jobs. Wholesale trade and transportation, warehouse, and utilities each brought 100 additional workers on board during the month.

Merchant wholesalers, durable goods (subsector 423) accounted for the 100-job increase in wholesale trade. The modest increase was spread across the entire spectrum of this subsector.

The 1,100-job increase in retail trade was well dispersed over the industries in that group. In



New Hampshire, food and beverage stores (subsector 445) added 300 jobs to their work force, while clothing, accessories, and general merchandise stores (subsectors 448 and 452 combined) expanded by 200 jobs. Electronic shopping (industry group 4541) enlarged its labor pool by 100-jobs.

Firms that engaged in scenic and sightseeing transportation (subsector 487) provided the impetus for the 100-job increase in the transportation, warehouse, and utilities area in June.

INFORMATION

Broadcasters (subsector 515) made minor adjustments to their staffs, and those changes resulted in a 100-job reduction in information (supersector 50)

FINANCIAL ACTIVITIES

June's 400-job increase in financial activities (supersector 60) was divided evenly between finance and insurance (sector 52) and real estate and rental and leasing (sector 53).

Finance and insurance's 200-job increase was further evenly divided between the two functions, as employment in insurance agents grew by 100 jobs.

The sample suggested that seasonal factors were at work with the 200-job increase in the real estate area. Condominium associations typically expand their work force during the summer months to perform outside maintenance tasks.

PROFESSIONAL AND BUSINESS SERVICES

Employment in professional and business services (supersector 60) edged upward by 300 jobs in June's preliminary unadjusted estimates.

Professional, scientific, and technical services (sector 54) accounted for 100 of those 300 jobs. No one industry in sector 54 stood out as the increase came from all facets of the sector.

Management of companies (sector 55) had a stable month of June in terms of its employment totals.

Administrative and support and waste management and remediation services (sector 56) saw its ranks grow by 200 jobs in June. The sample showed that firms involved in landscaping were the main cause for the increased employment.

Employment services (industry group 5613) reduced its payroll by 200 jobs.

EDUCATION AND HEALTH SERVICES

Education and health services (supersector 65) also experienced a seasonal shift in employment, as the level declined by 400 jobs overall.

For many firms in educational services (sector 61), June marks the completion of another academic term. Employment in the sector was down by 700 jobs from the previous month. Colleges, universities, and professional schools accounted for 600 of the 700 dropped jobs.

In its entirety, employment increased in health care and social assistance (sector 62) by 300 jobs. Hospitals (subsector 622) added 400 jobs, and ambulatory health care services expanded by 200 jobs in June.

Nursing care facilities (industry group 6231) went against the prevailing trend for this supersector. There were 100 fewer workers in this industry group for June.

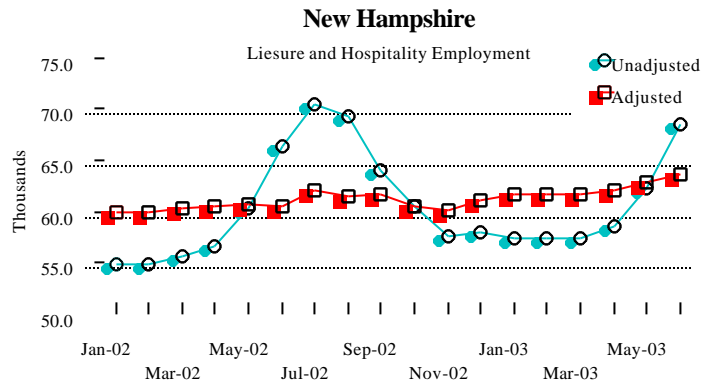
LEISURE AND HOSPITALITY

June marked the beginning of the vacation season, which was manifest in a 6,300-job increase in the leisure and hospitality (supersector 70) area. Accommodation and food services (sector 72) claimed 4,100 of the added jobs, while arts, entertainment, and recreation (sector 71) pitched in the remaining 2,200 jobs.

Of the 2,200 jobs added by sector 71, amusement, gambling, and recreation industries (subsector 713) were responsible for 1,700 of those jobs. Other areas of sector 71 encountered growth at a lesser rate.

Accommodation (subsector 721) expanded its ranks by 2,000 jobs in June's preliminary unadjusted estimates, and food services and drinking places (subsector 722) added 2,100 jobs to its roster.

Employment levels in full service restaurants (industry group 7221) grew by 1,500 jobs, and limited-services eating places (industry group 7222) experienced a 500-job increase.



OTHER SERVICES

Contributions to other services' (supersector 80) 500-job increase in June's employment levels came from all sectors of the group.

GOVERNMENT

Total government (supersector 90) employment declined by 400 jobs overall in June. Federal government contributed 100 jobs to the decline, which could be principally attributed to the U. S. Post Office making minor adjustments to its staff.

Employment in state government increased by 500 jobs in June's estimates. The sample indicated that the parks and recreation division and the liquor commission took on extra summertime help. June's growth was mitigated by the university system cutting back operations after another completed academic term. There were 2,300 fewer persons employed in state educational services during the month.

Local government ranks diminished by 800 jobs overall in June. This echelon of government experienced conditions similar to the state when administrative services grew by 900 jobs, and educational services dropped by 1,700 jobs in the monthly employment estimate. For many communities, local educational services completed their term much later in the month than usual.

